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FOREIGN CROPS AND MARKETS

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LATE CABLES

France 1939 wheat sowings destroyed by adverse weather officially estimated at 3,460,000 acres. (International Institute of Agriculture, Rome.)

This would indicate a 28-percent loss of the acreage sown to wheat up to January 1, reported at 12,249,000 acres, but resowings will be made to some extent.

Italy area sown to winter wheat for harvest in 1939 estimated at 12,635,000 acres as compared with 12,149,000 acres sown for 1938. (International Institute of Agriculture, Rome.)

Germany, excluding Austria, 1938 production estimates revised as follows with 1937 comparisons in parentheses: Wheat 204,954,000 bushels (164,121,000), rye 338,800,000 (272,296,000), barley 195,107,000 (167,086,000), oats 438,578,000 bushels (407,748,000). (International Institute of Agriculture, Rome.)

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THE 1938-39 ARGENTINE GRAIN PRODUCTION

The second official estimate of the 1938-39 Argentine wheat crop confirmed recent reports of favorable harvesting returns and showed an increase of about 4 million bushels over the first official estimate released in December, according to a cable from the Buenos Aires office of the Foreign Agricultural Service. Revised to 319,667,000 bushels, the outturn was second only to that of 1928-29 and exceeded the harvest of 1937-38 by almost 135 million bushels. With the carry-over on January 1 placed at about 8 million bushels and domestic utilization for 1939 estimated at about 99 million, Argentina had around 229 million bushels of wheat available for export or for carry-over into next season. Although wheat has been moving freely from farms to export points, and it is estimated that about half of the exportable surplus has already passed into the possession of the Grain Trade Control Board, very little Argentine wheat has been disposed of in foreign markets. Shipments during January totaled less than 10 million bushels.

Production estimates of the other grains and of flaxseed were considerably reduced. The rye crop, although revised to 10,826,000 bushels, was three times as large as the 1937-38 outturn of only 3,523,000 bushels and exceeded the average production of 1932-33 to 1936-37 by about 1 million bushels. The oat crop was placed at 49,604,000 bushels, as compared with 47,468,000 bushels harvested in 1937-38. Barley production, estimated at 20,209,000 bushels, was about 14 percent less than that of the previous year. Damaged by insects and unfavorable weather conditions after harvesting began, the flaxseed crop was reduced by 2,756,000 bushels to 61,020,000 bushels, as compared with 60,603,000 produced in 1937-38 and the 5-year average, 1932-33 to 1936-37, of 67,993,000 bushels.

BURMA HARVESTS BUMPER RICE CROP

The 1938-39 rice harvest in Burma is approximately 18 percent above last year's crop of 340 million bushels of rough rice, according to the final official estimate received by radiogram from the International Institute of Agriculture. Available information indicates that the current season's crop is a record harvest. Production from 1931-32 to 1935-36 averaged approximately 356 million bushels.

The 1938-39 harvested rice acreage in Burma was estimated at 12,529,000 acres, or approximately the same as a year ago, but more than 20 percent larger than the 5-year average 1931-32 to 1935-36.

Burma ranks as the world's largest rice exporter. The exportable surplus of rice and rice products for 1939 has been forecast at 7,952 million pounds, compared with the forecast a year ago of 6,944 million for 1938.

A very large percentage of the exports from Burma go to other British Empire countries. India generally takes about 50 percent, with Ceylon

and British Malaya also important market outlets. Rice exports to the United Kingdom have increased to approximately 150 million pounds annually compared with less than 100 million pounds a few years ago.

BURMA: Exports of rice and rice products, average 1926-30,
annual 1935-1939

Year	:	India	:	Other countries	:	Total
	:	Million	:	Million	:	Million
	:	pounds	:	pounds	:	pounds
Average 1926-1930.....	:	2,042	:	4,218	:	6,260
1935.....	:	3,635	:	3,218	:	6,853
1936.....	:	3,866	:	2,541	:	6,407
1937.....	:	3,139	:	3,366	:	6,505
1938.....	:	-	:	-	:	6,872
1939.....	:	-	:	-	:	a/ 7,952

American consular reports.

a/ Official forecast.

SIAM HARVESTS LARGE RICE CROP

The 1938-39 rice crop of Siam has been officially forecast at 244 million bushels, as compared with 230 million bushels harvested a year ago, according to a report received from American Vice Consul Elvin Seibert at Bangkok. The current crop is the largest harvested during the past 5 years, but is 7 million bushels below the record production of 1932-33.

The 1939-39 harvested acreage was estimated at 7,710,000 acres, as compared with 7,196,000 a year ago. This season's harvested acreage is the largest on record.

The Government of Siam estimated the supply of rice and rice products available for export during 1939 at 3,748 million pounds, compared with the forecast a year ago of 3,527 million pounds for 1938. Actual exports for 1938, according to preliminary customs returns, totaled 3,357 million pounds. Siamese rice exports from 1926 to 1930 averaged 2,954 million pounds.

A large percentage of the exports from Siam is usually sold in other Asiatic countries, such as British Malaya, China, and the Netherlands Indies. Normally, Cuba and certain European countries are also important markets for Siamese rice.

EGYPTIAN COTTON GINNINGS ALMOST COMPLETED

Egyptian ginnings of cotton, excluding linters, to the end of January totaled to 1,219,000 bales of 478 pounds, according to a cable received from the International Institute of Agriculture at Rome. Of this

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total, 780,000 bales consisted of Ashmouni and Zagora varieties. These figures compare with 1,532,000 bales, the total ginned through January 1938, and 967,000 bales for Ashmouni and Zagora.

Although most of the cotton usually is ginned by the end of April, the ginnings to date are over 80 percent of the estimated 1938-39 crop. This season's crop of 1,523,000 bales produced on 1,523,000 acres produced on 1,851,700 acres compares with 2,281,000 bales grown on 2,053,321 acres in 1937-38. In addition to the reduced acreage, a much lower yield was obtained this season because of unfavorable weather conditions and boll-worm damage. These factors combined to reduce materially the volume of the second picking and to eliminate the third picking entirely.

SALES OF FOREIGN COTTON IN CHINA INCREASE

Purchases of foreign cotton in China from October 1 to the middle of February are estimated to equal about 230,000 bales of 478 pounds, according to a radiogram received from Owen L. Dawson, Agricultural Commissioner at Shanghai. The increased interest in foreign cotton is the result of the small supply of Chinese cotton available at coastal milling centers and the favorable prices being received from the sale of yarn and piece goods.

Imports of foreign cotton during December exceeded 2,000 bales, the largest monthly arrival since May 1936. At the present time, it is believed that imports into China and Manchuria for the 1938-39 marketing year (October-September) will reach 365,000 bales, the largest imported since 1933-34.

Purchases of foreign cotton to date have been largely of Indian staple. The proportion of American has been small because there is difficulty in securing low grades to compete with Indian, and high grades are at a price disadvantage with respect to Brazilian cotton.

Chinese raw-cotton supplies are short on account of (1) the small 1938 crop, which was estimated at 2,300,000 bales, (2) the larger volume of exports to Japan, and (3) restrictions on the movement to market.

Prices for Chinese staple have continued to advance because of the early seasonal decline in arrivals, the increase in exports, and the high prices for cotton yarn. At Shanghai, Chinese raw cotton is now higher than Indian staple. On February 11, Chinese Standard and Tungchow were quoted at 8.55 and 8.32 cents per pound, respectively, while Indian Akola was selling at 7.73 cents and American Middling 7/8 was quoted at 10.78 cents per pound.

Mill activity in China has been gradually increasing from the low point a year ago when actual hostilities curtailed operations in the large milling centers. At the present time, mills in China and Manchuria

are estimated to be consuming approximately 155,000 bales per month. This rate, however, is more than 25 percent below that of 1936-1937. Mills in North China are reported to be operating at a greatly reduced level because of thier inability to obtain native raw cotton.

CHINA: Imports and exports of raw cotton, December 1938,
with comparisons a/
(In bales of 478 pounds net)

Item	December			October-December		
	1936	1937	1938	1936	1937	1938
	Bales	Bales	Bales	Bales	Bales	Bales
Imports -						
American.....	1,332	0	939	2,152	0	1,256
Indian	745	536	16,796	2,119	782	20,148
Egyptian	3,510	0	1,718	6,460	0	4,725
Others.....	2,067	56	2,633	12,030	387	9,755
Total.....	7,654	602	22,086	22,761	1,169	35,884
Exports.....	45,518	4,158	32,313	86,673	12,088	120,051

Shanghai office, Foreign Agricultural Service, and Monthly Returns of the Foreign Trade of China. a/ Excluding Manchuria.

CUBAN WINTER-VEGETABLE SHIPMENTS SMALLER THIS SEASON

Cuban winter-vegetable exports to the United States for the current season to February 1 were below the seasonal receipts to the same date last year and substantially smaller than in 1936-37, according to American Consul Harold S. Tewell at Habana. Returns from vegetable sales in the United States are said to have been unsatisfactory to Cuban growers recently and have been mainly responsible for the smaller shipments. Shipments of tomatoes, the chief item in the trade, were the lowest in recent years.

CUBA: Exports of fresh vegetables to the United States during present season to January 31, 1939, with comparisons

Kind	November-January		
	1936-37	1937-38	1938-39
	Thousand pounds	Thousand pounds	Thousand pounds
Tomatoes	33,370	32,766	28,226
Eggplant.....	3,003	1,051	2,310
Peppers.....	1,874	1,632	1,252
Okra	887	596	1,022
Lima beans	3,975	4,176	3,050
Cucumbers	2,048	1,466	1,786
Potatoes	859	1,047	656
Others	149	262	149
Total	46,165	42,996	38,451

MEXICAN WINTER-VEGETABLE EXPORTS DECLINE THIS SEASON

Exports of winter vegetables from the West Coast of Mexico to the United States during the early part of the 1938-39 season have been little more than half as large as the quantities shipped during the same period last year, according to a recent report received from American Vice Consul Thomas M. Powell at Nogales, Mexico. Prospects for exports during the remainder of the season are relatively poor unless more water becomes available for irrigation during the next few weeks and market conditions in the United States improve.

The decrease in exports is attributed mainly to a drastic reduction in planted acreage, low market prices in the United States and Canada, and insufficient water supplies for irrigation. Lack of capital among the regular growers and a number of expropriations by the Mexican Government of land in this district for distribution to farm workers are given as chief reasons for reduced plantings.

In former years a majority of the West Coast vegetable crops were financed by American capital. American interests have been hesitant about advancing funds this year because of uncertain market prospects and general economic conditions existing in the West Coast district.

MEXICO: Exports of fresh vegetables to the United States during present season to January 31, 1939, with comparisons

Kind	Season to January 31,			Total season	
	1937	1938	1939	1936-37	1937-38
	Thousand pounds	Thousand pounds	Thousand pounds	Thousand pounds	Thousand pounds
Tomatoes.....	8,132	10,749	6,467	65,024	40,062
Green peas.....	2,220	2,505	838	6,859	5,394
Green peppers.....	1,191	2,026	907	4,858	4,824
Green beans.....	51	142	5	89	186
Eggplants.....	56	65	91	520	428
Cucumbers.....	10	28	2	31	28
Lima beans.....	a/	-	-	16	21
Squash.....	a/	a/	-	1	-
Total.....	11,660	15,515	8,310	77,398	48,943

Taken from current consular reports.

a/ Less than 500 pounds.

COTTON: Price per pound of representative raw cotton at Liverpool,
February 17, 1939, with comparisons

Growth	1938		1939					
	Dec.		January			February		
	30	6	13	20	27	3	10	17
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
American -								
Middling	10.18	10.27	10.10	10.10	9.93	10.00	9.90	10.06
Low Middling	8.72	8.82	8.64	8.64	8.47	8.54	8.43	8.59
Egyptian (Fully Good Fair) -								
Giza 7	14.56	14.56	14.34	14.29	14.12	14.43	-	-
Sakellaridis	14.46	14.46	14.24	14.20	14.02	14.33	13.61	13.49
Uppers	11.69	11.69	11.54	11.43	11.35	11.58	11.52	11.52
Brazilian (Fair) -								
Ceara	9.01	9.11	8.93	8.93	8.76	8.83	8.73	8.88
Sao Paulo	9.69	9.79	9.61	9.61	9.45	9.51	9.41	9.57
Indian -								
Broach (Fully Good)	7.85	7.85	7.70	7.72	7.60	7.64	7.46	7.56
C.P. Oomra No.1, Superfine	8.14	8.14	8.00	8.02	7.89	7.93	7.85	7.95
Sind (Fully Good)	a/	a/	a/	a/	a/	a/	a/	a/
Peruvian (Good) -								
Tanguis	12.79	12.89	12.72	12.54	12.37	12.44	-	-

Converted at current exchange rates.

a/ Not quoted.

UNITED STATES: Exports of cotton to principal foreign markets,
annual 1936-37 and 1937-38, and the seasons
August 1-February 16, 1937-38 and 1938-39 a/
(Running bales)

Country to which exported	Year ended July 31		August 1 - February 16	
	1936-37	1937-38	1937-38	1938-39
	1,000 bales	1,000 bales	1,000 bales	1,000 bales
United Kingdom	1,221	1,630	1,304	352
Continental Europe	2,594	3,047	2,312	1,332
Total Europe	3,815	4,677	3,616	1,684
Japan	1,523	728	309	589
Other countries	380	541	378	223
Total	5,788	5,946	4,303	2,496
Linters	277	270	169	129
Total	5,511	5,676	4,134	2,367

Compiled from the Weekly Stock and Movement Report, New York Cotton Exchange.

a/ Includes linters.

BUTTER: New Zealand grading, 1938-39 season to February 11,
with comparisons

Date	1936-37	1937-38	1938-39
<u>Week ended</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
Aug. 6 to Nov. 26.....	122,713	119,838	103,287
December 3.....	10,696	10,696	9,520
10.....	11,032	10,248	9,856
17.....	10,730	11,144	9,800
24.....	7,168	9,520	10,640
31.....	12,208	10,304	9,408
Monthly total.....	51,834	51,912	49,224
January 7.....	11,592	10,136	8,568
14.....	9,184	9,408	9,688
21.....	11,872	8,848	9,128
28.....	9,632	8,020	8,288
Monthly total.....	42,280	36,412	35,672
February 4.....	10,136	8,120	7,392
11.....	9,520	8,064	7,672
Total to February 11..	236,483	224,346	203,247

Agricultural Attaché C. C. Taylor, London

BUTTER: Australian grading, 1938-39 season to January 28,
with comparisons

Date	1936-37	1937-38	1938-39
<u>Week ended</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
July 9-Oct. 29.....	42,892	43,260	57,989
November 5.....	4,997	6,044	6,651
12.....	5,096	6,561	7,484
19.....	5,696	7,571	8,239
26.....	5,042	7,338	7,506
Monthly total	20,831	27,514	29,880
December 3.....	5,233	8,411	7,918
10.....	4,944	7,159	7,121
17.....	4,384	7,177	7,464
24.....	3,147	6,839	6,738
31.....	4,842	7,054	5,466
Monthly total.....	22,550	36,640	34,707
January 7.....	6,962	7,820	5,634
14.....	6,238	6,760	4,825
21.....	6,303	6,518	4,117
28.....	6,359	6,164	3,696
Monthly total.....	25,862	27,262	18,272
Total to January 28...	112,135	134,676	140,848

Weekly Dairy Produce Notes, Imperial Economic Committee, London.

BUTTER: Price per pound in New York, San Francisco, Copenhagen, Montreal, and London, February 16, 1939, with comparisons

Market and description	February 17, 1938	February 9, 1938	February 16, 1939
	Cents	Cents	Cents
New York, 92 score.....	30.8	26.2	26.2
San Francisco, 92 score.....	30.0	27.0	28.0
Montreal.....a/	36.0	b/ 22.5	b/ 22.3
Copenhagen, official quotation..	23.0	26.2	25.4
London:			
Danish.....	28.8	31.7	30.3
New Zealand.....	25.3	25.5	25.5
Netherland.....	26.2	26.6	26.8

Foreign prices converted at current rates of exchange. a/ February 15.

b/ Quotation as of following day converted at prevailing rate.

PORK PRODUCTS: Price per 100 pounds at Liverpool, February 17, 1939, with comparisons a/

Market and item	February 18, 1938	February 10, 1939	February 17, 1939
	Dollars	Dollars	Dollars
First quality -			
American green bellies.....	16.28	14.85	14.82
Danish Wiltshire sides.....	22.00	20.91	20.92
Canadian green sides.....	18.97	18.09	18.16
American short cut green hams:	19.72	19.17	18.97
American refined lard.....	11.28	8.10	8.12

Quotations are on the basis of sales from importer to wholesaler.

a/ Converted at current rate of exchange.

CHOSEN: Acreage and production of specified crops, 1937-38

Item	Acreage		Production	
	1937	1938	1937	1938
	<u>1,000 acres</u>	<u>1,000 acres</u>	<u>1,000 bushels</u>	<u>1,000 bushels</u>
Wheat.....	836	845	10,242	10,401
Barley.....	2,687	2,737	66,590	51,098
Rice.....	4,017	4,068	243,715	219,540
Soybeans.....	-	-	20,205	18,480

Shanghai office, Foreign Agricultural Service.

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